# O.  Computer Reports

## Overview

**Introduction**  This section reviews all reports available on the UWIN system.

**In this section**  The following reports are found in this section:

| Topic | See Page |
|---|---|
| O.1.  Requirements | 3 |
| O.2.  Scheduling Reports | 5 |
|     Schedule Detail by Date Report | 5 |
|     Schedule Detail by Function Report | 6 |
|     Participant Schedule by Date Report | 7 |
|     Participant Scheudle by Function Report | 8 |
|     Schedule Summary Report | 9 |
|     Staff Requirements Forecast Report | 10 |
|     Participant Schedule by Staff Report | 11 |
|     Daily Clinic Roster | 12 |
|     Participant Schedule by Date Mailing Register | 13 |
| O.3.  Nutrition Education Reports | 14 |
|     Ad Hoc Mailing Register | 14 |
|     Special Food Package Issuance Report | 15 |
|     Nutrition Education Attendance Report | 16 |
|     Education Summary Report | 17 |
| O.4.  Breastfeeding Reports | 20 |
|     Due Date Follow-up Report | 20 |
|     Due Date Follow-up with BF Interest Report | 21 |
|     Infant Breastfeeding Tracking Report | 22 |
|     Summary Characteristics of BF Women Report | 23 |
|     Detail Characteristics of BF Women Report | 25 |

# Overview, Continued

**In this section** (continued)

# O.1. Requirements

**Required reports**

Listed below are all of the required reports as well as how often each report should be run. Specific information regarding each report can be found on the individual report page.

| Report # | Report Name | Frequency |
|---|---|---|
| WICPR118 | Beginning of Day | each day clinic is in session |
| WICPR116 | End of Day | each day clinic is in session |
| WICPR121 | Automated Termination | weekly or monthly |
| WICPR119 | Purge Report | monthly |
| WICPR118 | Potential Dual Application Report | every time someone is listed |
| WICPR222 | Proration Override Report | monthly |
| WICPR132 | Unauthorized Access Report | monthly or quarterly (<3 staff members) |
| WICPR122 | Ad Hoc (QA listing) | quarterly |

**Documentation**

All documentation must be done with pen. Be brief and to the point. Reference participant charts, names, other computer reports, voucher numbers or dates when necessary. Make sure your documentation can be understood by other individuals or auditors reviewing the documentation. You may use symbols or color coding as long as a key is provided explaining their meaning.

When using screen 108 in the UWIN system to document appropriate information:
1. be concise and to the point.
2. comments should be understandable to others
3. do not delete comments, only acknowledge them until the screen is full. Then "print screen" the comments and produce a hard copy. Place the hard copy in the participant's chart and delete all comments from screen 108.
4. Remember comments do not transfer to another clinic. If a priority 1 comment is received during a transfer, contact the previous clinic what action may be necessary.

# O.1. Requirements, Continued

**Storing reports**    All reports must be securely bound and tagged or labeled by month and Federal Fiscal year.  One folder can contain one or more months of computer reports.  A label should be placed on the front of each folder indicating which month(s) and year are included in the binder.  Do not use rubber bands or paper clips to secure computer reports.

## O.2. Schedule Detail by Date Report  (WICPR101)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #1 - Prepare Schedule Detail by Date Report |

**Description**

This report summarizes the number of participants currently scheduled for each appointment time.  The report is broken down by function.

The report allows you to enter a date range and/or the scheduling function(s) needed.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.

**Requirements**

None

**Suggested use**

Use in conjunction with other scheduling reports to manage scheduling activity.

## O.2. Schedule Detail by Function Report  (WICPR102)

**How to run this report**

| Step | Action |
|:---:|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #2 - Prepare Schedule Detail by Function Report |

**Description**

This report summarizes the number of participants currently scheduled for each function.  The report is broken down by date.

The report allows you to enter a date range and/or the scheduling function(s) needed.

**Parameters used by UWIN**

Number of participants scheduled for the specified day(s) and function(s) requested.

**Requirements**

None

**Suggested use**

Use in conjunction with other scheduling reports to manage scheduling activity.

## O.2. Participant Schedule by Date Report  (WICPR103)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #3 - Prepare Participant Schedule by Date Report |

**Description**

Provides an alphabetical listing of all participants and functions currently scheduled on a particular day.  Participants are listed alphabetically by last name.  Also prints comments entered with the "Pull Chart" indicator.
The report allows you to enter a date range.

If the participant is flagged as high risk an asterisk will print next to the participant name.

The total number of participants scheduled for that day is also listed.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) requested.

**Requirements**  None

**Suggested use**  Can be used to pull participant's file.

# O.2. Participant Schedule by Function Report  (WICPR104)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #4 - Prepare Participant Schedule by Function Report |

**Description**

Provides a listing by date of participants scheduled for each function.  Each function is listed on a separate page.  Blank lines are printed for appointments entered into the computer but not scheduled by a participant. Also prints comments entered with the "Pull Chart" indicator.

The report allows you to enter a date range and/or the scheduling function(s) needed.

If the participant is flagged as "high risk" an asterisk will print next to the participant name.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.

**Requirements**

None

**Suggested use**

Shows the appointment load for each function (certification, recertification, follow-up visits, FI pickup and nutrition education).

This report allows clinic who do not have their computer on every day to identify available appointments.

# O.2.  Schedule Summary Report  (WICPR105)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #5 - Prepare Schedule Summary Report |

**Description**    Shows the number of participants scheduled for each function on each day. Functions include certification, recertification, follow-up, FI pickup and nutrition education.  Looks like a calendar.
The report allows you to enter a date range needed.

**Parameters used by UWIN**    Number of participants scheduled for the specified time(s) for each scheduling function.

**Requirements**    None

**Suggested use**    Used as a quick reference when scheduling participants.  Will aid in obtaining an even caseload.

## O.2. Staff Requirements Forecast Report  (WICPR106)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #6 - Prepare Staff Requirements Forecast Report |

**Description**

Summarizes the amount of staff time required to serve participants that have been scheduled for a particular day. Based on parameters set up by the WIC coordinator/supervisor.

The report allows you to enter a date range and/or the scheduling function(s) needed.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.

**Requirements**

None

**Suggested use**

The supervisor can use this report to ensure enough staff members are scheduled for the day.

# O.2. Participant Schedule by Staff Report (WICPR141)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #7 - Prepare Participant Schedule by Staff Report |

**Description**

Provides a listing by day of scheduled participants by staff. This report serves as a schedule by showing the appointment load for each staff member.

The report allows you to enter a date range and/or the scheduling function(s) needed.

If the participant is flagged as high risk an asterisk will print next to the participant name.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.

**Requirements**

None

**Suggested use**

Could identify participants scheduled with special language needs.

## O.2. Daily Clinic Roster  (WICPR142)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #1 - Prepare Scheduling Reports |
| 3 | Select #8 - Prepare Daily Clinic Roster |

**Description**

Provides a listing of all participants scheduled on a particular day.
The report requires you to enter a date range .  You must also enter the scheduling function (C, R, F, E, K or A for All function). Also prints comments entered with the "Pull Chart" indicator.

If the participant is flagged as high risk an asterisk will print next to the participant name.

The total number of participants scheduled for that day is also listed.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.  If "A" is the requested function all functions are included.

**Requirements**

None - most frequently used scheduling report

**Suggested use**

If used to check participants who kept their appointments for the day, can be used in lieu of the Missed Appointment Mailing Register.

May also be used to pull participants files.

## O.2. Participant Schedule by Date Mailing Register (WICPR128)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #1 - Prepare Participant Schedule by Date Mailing Register |

**Description**

Provides a list of all participants who are scheduled for any function on an entered date.

The report allows you to enter a date range and/or the scheduling function(s) needed.

If requested, a mailing label may be printed for each participant listed.

**Parameters used by UWIN**

All participants scheduled for the specified day(s) and function(s) requested.

For a given date, participants with functions scheduled on that date will be listed once with all scheduled functions indicated to avoid repetition of participant IDs.

**Requirements**

None

**Suggested use**

Useful when contacting participants and to provide an audit trail of which participants were actually mailed a letter and when

# O.4. Ad Hoc Mailing Register  (WICPR122)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #4 - Prepare Ad Hoc Mailing Register |

**Description**

Provides a register list of all participant who match the ad hoc criteria entered.

If requested, a mailing label may be printed for each participant listed

The following parameters may be entered:

- date of birth
- participant ID
- status
- zip code
- priority
- risk factors
- category
- high risk

If the participant is flagged as high risk an asterisk will print next to the participant name.

**Parameters used by UWIN**

Whatever is specified

**Requirements**

Required for Quality Assurance Audit - See Section J for timeline and parameters to use.

Recommended for High Risk tracking

**Suggested use**

It is better to run high risk by individual code/grouped codes - if "high risk only" is marked, the actual risk factors do not print.

# O.4. Special Food Package Issuance Report  (WICPR150)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #J - Prepare Special Food Package Issuance Report |

**Description**

Lists all participants who receive non-contract or special formulas.
This report asks you to enter a date range.

**Parameters used by UWIN**

Food packages that are issued on or between the requested date range and have not been voided or misnumbered.  Food packages listed contain either non-contract or special formulas.

**Requirements**

Recommended monthly

**Suggested use**

Flag participants who need follow-up with their formula needs.

# O.4. Nutrition Education Attendance Report  (WICPR133)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #1 - Prepare Nutrition Education Attendance Report |

**Description**

Provides a list of participants that have attended group education sessions and a listing of participant that have not attended scheduled group education sessions for the date range entered.  Both listings are broken down by topic code.

The report allows you to enter a date range and a Y/N high risk option. If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Selected function is "E" (education) and the session was scheduled on or between the days entered in the date range.

Resulting table is broken down by class topic code and lists:

- participants who have attended either group or individual education session (including core contact)
- participants who have not attended or refused either group or individual education.

**Requirements**   None

**Suggested use**   Schedule those who are on the not attended list for a education appointment.

## O.4. Education Summary Report  (WICPR108)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #C - Prepare Education Summary Report |

**Description**

Shows participant education during the requested reporting period.  Show the number of participants by category who attended individual and/or group education sessions (excluding the certification visit).

The second page is a summary of education attendance during the requested reporting period.

The report allows you to enter a date range and/or Y/N in high risk.  If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria.  If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

## O.4. Education Summary Report  (WICPR108), Continued

**Parameters used by UWIN**

Participants who have a an "E" (education) appointment in screen 107 and the session was scheduled on or between the days entered in the date range. Attendance code is marked "Y."

If the participant has attended more than one individual or group session that met the selection criteria - only the most recent session is counted.  If the participant attended one group session and one individual session, both are counted in their respective category totals.

Certified in Period - total counts of all participants who have a cert or recert date between date ranges selected.

Number of Participants Completing a Certification Period - count of participants who have a term date in specified range.

Number of Participants Scheduled for their Minimum Number of Education Contacts - count of education sessions scheduled within the cert and term date of participants who have a term date with the range specified.

Percentage - calculation is the number of participants scheduled for their minimum number of education contacts divided by number of participants completing a certification period.

Number of Participants Receiving their Minimum Number of Education Contacts - counts sessions attended from the total scheduled with in the cert and term date and with the term date in range specified.

Percentage - Number of participants receiving their minimum number of education contacts divided by number of participants completing a certification period.

Overall Attendance Rate - Number of participants receiving their minimum number of education contacts divided by number of participants scheduled for their minimum number of education contacts.

**Minimum number of education sessions is set to 2.  Core contact is considered a session.

## O.4. Education Summary Report  (WICPR108), Continued

**Requirements**   None

**Suggested use**   Monitor the number of participants receiving the minimum number of education visits.

## O.4.  Due Date Follow-up Report  (WICPR127)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #3 - Prepare Due Date Follow-up Report |

**Description**
Lists participants whose estimated date of delivery is 3 or more weeks in the past but have no actual delivery date recorded.
If the participant is flagged as high risk an asterisk will print next to the participant name.

**Parameters used by UWIN**
Pregnant women whose EDD is 3 or more weeks in the past and do not have an ADD entered into the UWIN system.

**Requirements**   None

**Suggested use**
Check for recert appointment.
Give to peer counselors to do breastfeeding follow-up.

## O.4.  Due Date Follow-up with BF Interest Report  (WICPR144)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #8 - Prepare Due Date Follow-up with BF Interest Report |

**Description**    Lists participants whose estimated date of delivery is within a time range specified. The report allows you to enter a date range.

**Parameters used by UWIN**    Active pregnant or breastfeeding women who have indicated they are interested or undecided about breastfeeding and have and EDD date equal to or between the dates entered in the date range.

Active pregnant or breastfeeding women who have indicated they are interested or undecided about breastfeeding and had a delivery date within 2 weeks prior to the current date (today).

**Requirements**    None

**Suggested use**    Peer counselor follow-up.

# O.4. Infant Breastfeeding Tracking Report  (WICPR126)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #4 - Prepare Infant Breastfeeding Tracking Report |

**Description**

Summarizes breastfeeding information infants and children up to the age of 2. Information includes currently breastfeeding data and reason ceased.

The second part of this report lists all infants < 1 month who are currently breastfeeding.

**Parameters used by UWIN**

Active participants two year of age or younger.  Participant's currently breastfeeding as of the ending period date will be summarized according to the frequency of breastfeeding.  Participants who ceased breastfeeding in the date range entered will be summarized by reason ceased.

The second part of this report collects active infants < 1 month of age who have Yes in the currently breastfeeding field.

The report allows you to enter a date range.

**Requirements**  None

**Suggested use**

Provides information for monitoring breastfeeding rates and identifying education and support needs.
The second part can be used for follow-up calls to mothers of breastfeeding newborns.

## O.4. Summary Characteristics of BF Women Report (WICPR129)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #5 - Prepare Summary Characteristics of BF Women Report |

**Description**

Provides a characteristic summary of women currently breastfeeding and women who have ceased breastfeeding during the report period. This report is broken down by the following independent categories:

- age
- race
- marital status
- education
- gravida (# of pregnancies)

Within each category, the women are further divided by group (< 18 and 18+). Each category is then broken down by breastfeeding frequency. The total number breastfeeding is displayed.

The second half of the report summarizes the number of women that have ceased breastfeeding during the period according to the reason breastfeeding was ceased. The total number ceased is displayed.

The report requires you to enter a beginning and ending date range.

**Parameters used by UWIN**

The reporting period can be any range in the past two years.
All women over 8 years of age who have ceased breastfeeding within the period are counted as having ceased.
Women over 8 years of age who are counted as currently breastfeeding must have a Yes in currently breastfeeding at of the date in the End Date range. Both active and terminated women are counted.

## O.4. Summary Characteristics of BF Women Report (WICPR129), Continued

**Requirements**   None

**Suggested use**   Provides information for monitoring breastfeeding rates and identifying education and support needs.

# O.4. Detail Characteristics of BF Women Report (WICPR130)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #6 - Prepare Detail Characteristics of BF Women Report |

**Description**  Provides a detailed breakdown of breastfeeding characteristics for women. This report provides a breakdown of women currently breastfeeding by frequency, the number of women who ceased breastfeeding by reason, and the average duration of breastfeeding. This report can broken down by the following categories:

- age
- race
- marital status
- education
- gravida (# of pregnancies)

**Parameters used by UWIN**  The reporting period can be any range in the past two years.

All women who have ceased breastfeeding within the period are counted as having ceased.

Women who are counted as currently breastfeeding must have a "Yes" in currently breastfeeding at of the date in the End Date range.

Total ceased BF outside period count all participants who ceased breastfeeding before the beginning date of the date ranges used.

The average duration is calculated using duration of breastfeeding for women who ceased breastfeeding outside of the range entered.

Total never breastfed counts those who never breastfed

Both active and terminated women are counted in all totals.

**Requirements**  None

## O.4. Detail Characteristics of BF Women Report (WICPR130), Continued

**Suggested use**  Provides information for monitoring breastfeeding rates and identifying education and support needs.

## O.5. Beginning-of-Day Process  (WICPR118)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #5 - Perform System Administration |
| 2 | Select #1 - Daily System Administration |
| 3 | Select #1 - Beginning-of-Day Process |

**Description**

Provides a count of the records downloaded from the state and a count of the records processed.

This second page is a Dual Application Report which lists all participants who may be receiving vouchers in two clinics simultaneously.  The first record is a potential dual participant from the clinic running the report.  The records that follow contain participant information from other clinics.

The third page is the Transfer Termination Report.  It lists all participants whom another clinic has requested a transfer on.

## O.5. Beginning-of-Day Process  (WICPR118), Continued

**Parameters used by UWIN**

Participant - the number of downloaded and processed participant records.

Visit - the number of downloaded and processed visit records.

Obligation - the number of downloaded and processed obligation records.

Dual Appl - the number of downloaded and processed dual certification records.

Education - the number of downloaded and processed education scheduling records.

Term Request - the number of downloaded and processed termination request records.

Food Packages - the number of downloaded and processed food packages.

Food Instruments - the number of downloaded and processed food instruments.

Food Items - the number of downloaded and processed food items.

Item Prices - the number of downloaded and processed item prices.

Total - the total of downloaded and processed records.

Message - information or instructions from the state agency (not currently available for use)

**Note:  the number of downloaded and processed records must match or an error message will occur and the help desk must be called.

## O.5. Beginning-of-Day Process  (WICPR118), Continued

**Requirements**   Required - Dual Application - must document resolution (i.e. twins, transferred to ----- clinic, etc.).  Voucher issuance will be locked until resolution takes place in the computer system.  If the participant is identified as a dual, the clinic where the dual occurred needs to contact the other local agency that the participant is enrolled in and decide who will terminate the participant.  One of the clinic must manually terminate the participant.

**Suggested use**   Monitor number of participants transferring out of your clinic.

**Important information**   Everyone must be logged off the system in order to run this report.

# O.5. End-of-Day Report  (WICPR116)

**How to run this report**

| Step | Action |
|:---:|---|
| 1 | Select #5 - Perform System Administration |
| 2 | Select #1 - Daily System Administration |
| 3 | Select #2 - End-of-Day Process |

**Description**

Summarizes control totals created as part of the end-of-day processing.  Totals of records and current participant files counts by status are printed.

Beginning with page 2, the food instrument log prints.  This provides an audit trail of all obligations uploaded overnight from the clinic site to the mainframe.  A record is shown for each food instrument issued, voided, or reissued.

**Parameters used by UWIN**

All food instruments issued since the last End-of-Day was run.
Number of records uploaded and total number of records, by status, on your clinic's database.

**Requirements**

Recommended - Food Instrument log - locate all gaps on the log.  Decide if they were caused by voiding returned vouchers, using multiple printer, or misnumbering.  If a check is missing, the clinic needs to resolve the problem.

**Suggested use**

Monitor number of participants vouchered each day.  Also gives active and terminated count.  Using this active count, find the percent of participants who receive vouchers each month (with the vouchered number on the Participant by Priority and Category Report)

**Important information**

Everyone must be logged off the system in order to run this report.

# O.5.  Automated Termination  (WICPR110)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #5 - Perform System Administration |
| 2 | Select #2 - Periodic System Administration |
| 3 | Select #5 - Automated Termination |

**Description**   Provides a listing of all terminated participants by participant's last name.

**Parameters used by UWIN**   All participants who were terminated either manually or automatically since the last report will be included on this report.

**Requirements**   Required - run weekly or monthly.  No documentation is required

**Suggested use**   Clean out active files.

**Important information**   This report must be ran prior to running the Beginning-Of-Day report.  Do not run this report on the same day as the Purge Report.  Everyone must be logged off the system in order to run this report.

# O.5. Purge Processing  (WICPR119)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #5 - Perform System Administration |
| 2 | Select #2 - Periodic System Administration |
| 3 | Select #6 - Purge Processing |

**Description**

Provides a list of participants who have been purged of the clinic's computer system.  Listed alphabetically by participant's last name.

**Parameters used by UWIN**

Participants will be purged for the following reasons:

- Pending or Ineligible for 180 days
- wait listed for 395 days
- terminated for 6 months
- group head with no other family members still on the computer and they have been termed for 6 months
- Food instruments purges 180 days after Last Day to Use
- Education history records 5 years after education date
- scheduling records 1 year after scheduled date
- holiday administration date purges day after date of holiday or administration day

**Requirements**

Required - monthly.  Do not run this report the same day as the Auto Term Report. Must be run prior to Beginning of Day.

**Suggested use**

Clean out files.

**Important information**

Do not run this report the same day you run the Automated Termination report.  An End-Of-Day must be run after this report.  Everyone must be logged off the system in order to run this report.

# O.5. Unauthorized Access Report  (WICPR132)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #7 - Prepare Unauthorized Access Report |

**Description**  Provides a list of unauthorized access attempts for each security area on the UWIN system.  The report list the name of the user, the date and time of the attempted access and the user ID.

**Parameters used by UWIN**  Any staff member who goes where they are not suppose to on the UWIN system.

**Requirements**  Required  - run monthly for large clinics (3+ staff members) and quarterly for smaller clinics (<3 staff members).

**Suggested use**  When multiple attempts within a brief period of time have been made by one individual, provide counseling and document.

## O.5. Proration Override Report  (WICPR222)

**How to run this report**

| Step | Action |
|:---:|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #I - Prepare Proration Override Report |

**Description**

Provides a list of participants who received a full rather than a prorated food package.

This report allows you to enter a date range.

**Parameters used by UWIN**

Participants who have had "Y" entered when asked the question "Proration Override?" within the date range.  Based on issue date.

Only flagged if the original issuance is prorated.  If reissued, the proration override is not flagged and will not show up on the report.

**Requirements**

Required - document the reason each participant received a full package either in screen 108 or on the Proration Override report.

**Suggested use**

Monitor to see if there are problems in your clinic with overissuing food packages.

# O.5. Missed Appointment Mailing Register (WICPR140)

**How to run this report**

| Step | Action |
| --- | --- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #5 - Prepare Missed Appointment Mailing Register |

**Description**

Lists participants who missed appointment during the specified time period.
If requested, a Missed Appointment Letter and/or mailing label may be printed for each participant listed.  The participant ID prints on the list and on the letter.
The report requires you to enter a date range.

**Parameters used by UWIN**

All participants who have an appointment scheduled on or between the requested date range and have "N" as attended flag for that appointment.

**Requirements**

Required daily or weekly if another means of identifying Missed Appointments is not used.

**Suggested use**

To send Missed Appointment notices to those who miss their education appointment.

## O.5. Missed FI Pickup Mailing Register  (WICPR112)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #2 - Prepare Missed FI Pickup Mailing Register |

**Description**

Provides a listing of participants that have missed their scheduled FI pickup appointment during the date range selected.

If the participant is flagged as high risk an asterisk will print next to the participant name.

If requested, a mailing label may be printed for each participant listed.

**Parameters used by UWIN**

Lists all participant who miss their FI pickup appointment.  No other missed appointments will be printed.

**Requirements**

None

**Suggested use**

Use to send reminder letters to those participants who miss their FI appointment.

# O.5. Missed Appointment Summary Report  (WICPR139)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #G - Prepare Missed Appointment Summary Report |

**Description**

Provides summary statistics of all missed appointments.

The report allows you to enter a date range and/or Y/N in high risk.  If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Counts each participants who has an "N" in each type of appointment for each day within date range.

**Requirements**   None

**Suggested use**

Monitor number of missed appointments for each type of appointment.  May indicate if reminder letters or extra appointments are needed for specific types of appointments.

## O.5.  Certifications Due Mailing Register  (WICPR111)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #6 - Prepare Certifications Due Mailing Register |

**Description**

Provides a listing of participants who have upcoming recertifications but have not yet been scheduled for a recertification appointment.
The report allows you to enter a date range.

**Parameters used by UWIN**

Participants who are due to be certified and are not currently scheduled for a recertification appointment in the computer.  Drawback - if scheduling by family, and not scheduling under that particular participant, they will show up on the report.

**Requirements**

None

**Suggested use**

Use as a checklist to ensure all participants received notice of their expiring certification.

## O.5. Ineligibility Report  (WICPR125)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #H - Prepare Ineligibility Report |

**Description**

Provides a list of all participants who are ineligible for the WIC Program.
This report allows you to enter a date range.

**Parameters used by UWIN**

Any participants who have ineligible within the date range entered.

**Requirements**

None

**Suggested use**

Verify that all appropriate ineligible files are in place.
Monitor the number of participants not eligible for the program for different reasons (clinic error, over income, no show, etc.)

# O.5. Categorically Ineligible Mailing Register (WICPR121)

**How to run this report**

| Step | Action |
| :---: | :--- |
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #2 - Prepare Mailing Registers & Labels |
| 3 | Select #3 - Prepare Categorically Ineligible Mailing Register |

**Description**

Provides a mailing register of all participants due to terminate or who have already been terminated within the print range and cannot be recertified, i.e. ineligible for further WIC benefits.

The report allows you to enter a date range and/or the category needed.

If requested, a Letter of Ineligibility and/or mailing label may be printed for each participant listed.

**Parameters used by UWIN**

All children turning 5 years old during the specified time period.

All postpartum women who are 6 months postpartum during the specified time period.

All breastfeeding women whose infant has their first birthday during the specified time period.

**Requirements**

None

**Suggested use**

Produce a Letter of Ineligibility for all participants who will be Categorically Ineligible during the month.

# O.5. Wait List by Category and Priority Report  (WICPR114)

**How to run this report**

| Step | Action |
|------|--------|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #2 - Prepare Wait List by Category and Priority Report |

**Description**

Provides a list of all participants on the wait list within a clinic.  The report is broken down by priority.

The report allows you to enter Y/N high risk option. If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Participants who have "W" entered in the "Action" field in screen 102.

**Requirements**

Required during times of caseload management.

**Suggested use**

Notify applicants who did not receive vouchers during caseload management that they may now receive benefits or need to reapply.

## O.5. Participant Master Record  (WICPR109)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #A - Prepare Participant Master Record |

**Description**

A printed copy of a participant's record.  Option to print any number of certification visits or all visits the participant has made.

**Parameters used by UWIN**

Information from the current certification period or from all certification periods if requested.

**Requirements**

None

**Suggested use**

For clinics who do not have a computer for CPAs, this is a nice printout for them to see the participant's past history.

# O.5. Participant by Priority and Category Report  (WICPR107)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #B - Prepare Participant by Priority and Category Report |

**Description**

Summarizes participation of voucher participants at each priority level.  Participants are divided into categories (P, B, N, I, C)

The report allows you to enter a date range and a Y/N high risk option. If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Participants, active or termed, who received vouchers during the specified time frame.

**Requirements**

None

**Suggested use**

Monitor percent caseload issued vouchers for each month.

## O.5. Referred From Report  (WICPR123)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #D - Prepare Referred From Report |

**Description**   List of participant referred to the WIC program from other agencies or programs. The report allows you to enter a date range and/or Y/N in high risk.  If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**   Total Number Referred From - the number of participants who were referred from the agency.

Grand Total - the total number of participants who were referred to the WIC program from all other agencies.

**Requirements**   None

**Suggested use**   Incorporate into outreach, letting the grassroots organization know how many participants they referred to us.

## O.5. Referred To Report  (WICPR124)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #E - Prepare Referred To Report |

**Description**

List of participant referred to other agencies by the WIC program.

The report allows you to enter a date range and/or Y/N in high risk.  If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Total Part Referred To - the number of participants who were referred to the agency.

Grand Total - the total number of participants who were referred from the WIC program to all other agencies.

**Requirements**

None

**Suggested use**

Incorporate into outreach, letting the grassroots organization know how many participants we referred to them.

Could also use to follow up with specific participants to see if they utilized the referrals made.

# O.5. Referral Summary Report  (WICPR131)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #F - Prepare Referral Summary Report |

**Description**

Summarizes the total number of participants referred to and referred from other agencies.

The report allows you to enter a date range and/or Y/N in high risk.  If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk.  If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Total Referred To - the total number of participants referred to this agency.

Total Referred From - the total number of participants referred to the WIC program from this agency.

Grand Total Number of Participants Referred - the grand total number of participants referred to and referred from all agencies combined.

**Requirements**    None

**Suggested use**    See "Referred To" and "Referred From" reports in this section.

## O.5. Participants Receiving Medicaid Benefits Report (WICPR145)

**How to run this report**

| Step | Action |
|---|---|
| 1 | Select #4 - Prepare Management Reports |
| 2 | Select #3 - Prepare Management Reports |
| 3 | Select #9 - Prepare Participants Receiving Medicaid Benefits Report |

**Description**

Lists participants receiving Medicaid benefits.

The report allows you to enter Y/N for high risk participants. If "Y" is entered in high risk, resulted are limited to participants who are high risk and meet selection criteria, If "N" is entered, results are limited to participant who are not high risk. If left blank, all participants who meet the criteria will be listed.

**Parameters used by UWIN**

Participants who have "02" entered in Public Assistance.

**Requirements**

None

**Suggested use**

Coordinate outreach efforts with the Medicaid program.